

## **Tips For Success**

### **Basic Preparers**

1. Clock-in upon arrival
2. Name-tag (first & last name)
3. Get room assignment and set-up computer/printer
4. Log-in to TaxSlayer – if difficulty logging-in, see a Site Director
5. Let Admin Director know you are ready to see a client
6. Prep clients return and try to rectify any questions with the client or an advanced preparer
7. Client docs MUST be scanned and uploaded to TaxSlayer
8. If docs are on phone, try to scan the phone, or make a note in TaxSlayer that docs were taken from client phone
9. When prep is complete, let Admin Director know you are ready for a review
10. Once review is complete, accompany the advanced preparer to walk client to client check-out station
11. Let Admin Director know you are ready for another client